

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the United Kingdom

June 2023

Table of Contents

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the United Kingdom - Category analysis

KEY DATA FINDINGS

2022 DEVELOPMENTS

Closed single-use vapour products experience stellar growth at the expense of other vaping categories Big tobacco companies enter the closed single-use systems race Grocery retailers continue to gain share in the tobacco-alternative categories

PROSPECTS AND OPPORTUNITIES

Vaping to grow as consumers look for less unhealthy and more affordable options Growth expected in nicotine pouches in spite of rising popularity of single-use systems Heated tobacco to grow as an alternative to vaping for smokers

CATEGORY INDICATORS

Table 1 - Number of Adult Vapers 2017-2022

CATEGORY DATA

Table 2 - Sales of Tobacco Heating Devices: Volume 2017-2022 Table 3 - Sales of Tobacco Heating Devices: % Volume Growth 2017-2022 Table 4 - Sales of Heated Tobacco: Volume 2017-2022 Table 5 - Sales of Heated Tobacco: % Volume Growth 2017-2022 Table 6 - Sales of Tobacco Free Oral Nicotine: Volume 2017-2022 Table 7 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2017-2022 Table 8 - Sales of Tobacco Free Oral Nicotine by Category: Value 2017-2022 Table 9 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2017-2022 Table 10 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022 Table 11 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022 Table 12 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2022 Table 13 - NBO Company Shares of Smokeless Tobacco: % Volume 2018-2022 Table 14 - LBN Brand Shares of Smokeless Tobacco: % Volume 2019-2022 Table 15 - NBO Company Shares of E-Vapour Products: % Value 2018-2022 Table 16 - LBN Brand Shares of E-Vapour Products: % Value 2019-2022 Table 17 - NBO Company Shares of Tobacco Heating Devices: % Volume 2018-2022 Table 18 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2019-2022 Table 19 - NBO Company Shares of Heated Tobacco: % Volume 2018-2022 Table 20 - LBN Brand Shares of Heated Tobacco: % Volume 2019-2022 Table 21 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2018-2022 Table 22 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2019-2022 Table 23 - Distribution of E-Vapour Products by Format: % Value 2017-2022 Table 24 - Forecast Sales of Tobacco Heating Devices: Volume 2022-2027 Table 25 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2022-2027 Table 26 - Forecast Sales of Heated Tobacco: Volume 2022-2027 Table 27 - Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027 Table 28 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2022-2027 Table 29 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2022-2027 Table 30 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2022-2027 Table 31 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2022-2027 Table 32 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027 Table 33 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2022-2027

Tobacco in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Tobacco in 2022: The big picture 2022 key trends Competitive landscape Retailing developments What next for tobacco?

OPERATING ENVIRONMENT

Legislation Legislative overview Summary 1 - Legislation Summary at a Glance Minimum legal smoking age Smoking prevalence Tar levels Health warnings Plain packaging Advertising and sponsorship Point-of-sale display bans Smoking in public places Low ignition propensity (LIP) cigarette regulation Flavoured tobacco product ban Reduced harm Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

Table 34 - Number of Adult Smokers by Gender 2017-2022

MARKET DATA

Table 35 - Sales of Tobacco by Category: Volume 2017-2022Table 36 - Sales of Tobacco by Category: Value 2017-2022Table 37 - Sales of Tobacco by Category: % Volume Growth 2017-2022Table 38 - Sales of Tobacco by Category: % Value Growth 2017-2022Table 39 - Forecast Sales of Tobacco by Category: Volume 2022-2027Table 40 - Forecast Sales of Tobacco by Category: Value 2022-2027Table 41 - Forecast Sales of Tobacco by Category: % Volume Growth 2022-2027Table 42 - Forecast Sales of Tobacco by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus

of operations, their competitors, their geographic presence and performance.

• Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-the-united-kingdom/report.